

PORTFOLIO ASSESSMENT

Establishing Habits of Documentation, Reflection, and Analysis



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ESTABLISHING HABITS

Documentation, Reflection, Analysis

Portfolio assessment distinguishes itself from other assessment methods by its potential to support more than the mere *evaluation* of learning. When we curate and reflect upon portfolio documents and artifacts with purposeful intention, this assessment method actually *produces* learning. The steps below provide a solid start.

1

DEFINE YOUR PURPOSE AND PLAN AHEAD

Unpack the educational outcomes you hope to achieve. Consider how you've already begun meeting them, and define future opportunities to do so. If possible, create a calendar listing upcoming events and the outcomes that each may attend to. Which outcomes are you most interested in mastering? What do you hope to learn? How could you document your learning? Capture your reflections.

2

CONSIDER YOUR AUDIENCE

Portfolios enable us to share the story of our learning with interested audiences. Who will your primary audience be? How should your awareness of audience influence your work?

3

DEFINE YOUR LEARNING

Which learning moves will you strive to document? Which artifacts might best reflect your growth? Documentation is complex work, and false starts and failure are a part of the process. Knowing what you want to capture, why, when, and how ensures greater success.

4

CHOOSE YOUR METHOD

Interviews, observations, documents, and artifacts provide powerful data for portfolio keepers. Understanding the benefits and limitations of each method will help you make effective choices

5

CHOOSE YOUR TOOLS

The best tool for your work is the one that allows you to capture the best evidence of your learning in the most efficient and least disruptive way.



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6

COLLECT YOUR EVIDENCE

Portfolio keepers often feel themselves pulled in multiple directions. Acting as learner, documentarian, and participant in assessment and evaluation processes can be overwhelming. At times, it's hard to know if particular evidence will be valuable in a moment. Know your purpose, gather what seems relevant, and know you can grab more later if needed. Keep your evidence in an easily accessible place.

7

REFLECT IN PROCESS

Add notes, reflections, descriptions, and details to the evidence that you gather. This will serve you well as you approach deeper analysis work. It will help you learn more within the moment, too.

8

REFLECT, ANALYZE, THEORIZE

Assume a reflective stance before, during, and after your learning experiences. Document what is relevant, and analyze your evidence. What are you discovering?



THREE MOVES THAT MAKE LEARNING VISIBLE



Processes

More than the product of your learning, strive to make the process that you moved through visible to others.

Reflections

Capture your reflections before, during, and after learning. Use the prompts on page to inspire you, if needed.

Metacognitive Moves

Consistently assess your strengths and needs, relative to your identified outcomes and purposes.

Consider task variables:

How is the task influencing your process, your ability to persevere, and your success? What types of tasks are you able to tackle with ease? Where do you struggle? Why? What will you do to overcome these challenges?

Consider strategy variables:

Which strategies empower your learning? Which diminish it? How will these realizations inform your next steps? How do they change your learning story?



Evidence of Learning

HOW TO GATHER WHAT MATTERS

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1

Interviews

We interview people to learn things that we cannot learn from observation or the analysis of artifacts or documents. Interviews allow us to tap diverse perspectives. How could they deepen your learning?

2

Observations

Conscious and systematic observations enable learners to study phenomenon in naturally occurring settings. Become a careful observer, take detailed notes, and learn how to separate detail from trivia.

3

Artifacts and Documents

Documents provide a record of communication within a learning experience. Artifacts are objects scooped from the learning environment itself. Both are used to deepen analysis and reflection.



Structure

Highly Structured

Predetermined order and wording of questions

Semi-Structured

Flexible order and wording of questions

Mix of more and less structured questions

Unstructured

Open-ended questions

Flexible and exploratory structure

Purpose

To Gather Specific Data

Interviewer assumes a neutral stance and requires answers to specific questions intended to reduce bias

To Reveal Subjectivities

Interviewer makes no claim to objectivity. Semi-structured or unstructured approaches enable learners to be self-revealing

Conducting INTERVIEWS WITH LEARNERS

Adapted from the work of Sharan Merriam
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Gather Responses

Experience and Behavior Questions

What happened? How did you react?

Opinion and Values Questions

What is your perspective? What mattered?

Feeling Questions

How did this make you feel?

Knowledge Questions

What facts did you gather?

Sensory Questions

What did you see, hear, smell, taste, feel?

Deepen Thinking

Hypothetical Questions

What if...?

Suppose....?

Devil's Advocate Questions

Some say....what do you say?

Ideal Position

What would the ideal situation be?

Interpretive Questions

What is your reaction to this?

MAKING MEANINGFUL OBSERVATIONS



What will you observe?

EVENTS - BEHAVIORS - PERSONS - SETTINGS

Michael Quinn Patton, former President of the American Evaluation Association, suggests that when we position ourselves as both participants and observers inside a learning experience, a variety of problems arise. Observations take place in natural settings, and this reality alone makes them appealing to the documentarian. We'd like to assume that observations do not require any disruption of the learning experience, but those who are practiced in careful observation will tell you this isn't necessarily true. Learning to pay attention is a discipline that distinguishes itself from the sort of routine observations that humans make every day. These observations must address specific questions about learning, and we should strive to produce trustworthy findings.

How to Begin:

1. Clarify your purpose.
2. Determine who or what you will observe, relevant to this purpose:

Specific people	Interactions	Conversations	Your own behavior
Activities	Setting	Processes	What doesn't happen
3. Choose to record your observations for future review or document your findings in the moment.
4. Make meaningful notes that include:

Elaborate details	Metaphors and analogies	Emerging theories	Examples
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5. Invite others to share their perspectives, and add them to your own.



INCLUDING DOCUMENTS AND ARTIFACTS

DOCUMENTS are typically physical forms of communication. They include public records, personal documents, popular culture documents (produced for television, radio, or the internet), and visual documents like photographs and videos.

ARTIFACTS are objects gathered from the settings that learning experiences occur within. They include instruments, tools, and utensils.

Letters, emails, diary and journal entries, text exchanges, and social media postings are personal documents that reveal powerful findings relevant to attitudes, feelings, beliefs, and values.

Photo elicitation is the process by which people review photos relevant to a topic of interest in order to stimulate ideas and discussion.

QUALITY REFLECTION

LOOKING OUT

CONSIDER INFLUENCE

Questions to Consider:

1. What are the greater implications of your work?
2. Who might be effected by your discoveries? How could this influence your next steps?
3. What are others trying to achieve? How does this effect your thinking, learning, or work?
4. How are you behaving, and how is this influencing others? How are their behaviors effecting you?
5. What do you wish you knew more about? Who can help you accomplish this learning? Who could you teach? What would you teach them?
6. What are the unintended consequences of your thinking, learning, and work?
7. What will you do differently, as a result of your learning?
8. How did one choice, action, or thought influence another?
9. How do certain documents, observations, or interview findings connect? Where do they contradict one another?



LOOKING IN

KNOW YOURSELF AND YOUR WORK

Questions to Consider:

1. What is your ideal outcome?
2. What is your current reality?
3. How will you bridge the distance?
4. What constraints are you facing? How can you diminish their effect?
5. What advantages do you have? How can you leverage them?
6. What do you need? How will you gain satisfaction?



LOOKING UP

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IMPROVE YOUR REFLECTIVE PRACTICE

Questions to Consider;

1. How can you amplify your thinking, learning, and work in order to enrich, refine, and/or gain feedback on it?
2. How can you better use the evidence you collect to understand your strengths, your needs, and your growth as a learner?
3. How will the learning accomplished through the development of your previous work influence your current or future work?
4. What patterns and trends are you noticing in your evidence? How are they informing and improving your practice?
5. What effect does reflection have on the quality of your learning and work? Where do you need to reflect more? How will you accomplish this?

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